

## MORRISON DOM & ASSOCIATES LTD.

### PERSONAL INCOME TAX CHECKLIST

PLEASE SUBMIT A COMPLETED CHECKLIST WITH YOUR TAX RETURN DOCUMENTATION

PLEASE PROVIDE ALL OF THE FOLLOWING THAT IS APPLICABLE TO YOU

Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Birthdate: \_\_\_\_\_  
Canadian Citizen? Yes \_\_\_\_\_ No \_\_\_\_\_  
Single \_\_\_\_\_ Married \_\_\_\_\_ Divorced \_\_\_\_\_ Common Law \_\_\_\_\_  
Spouse's Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Birthdate: \_\_\_\_\_  
Canadian Citizen Yes \_\_\_\_\_ No \_\_\_\_\_  
Spouses Net Income if filing separately \_\_\_\_\_  
Dependent's Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Birthdate: \_\_\_\_\_  
Dependent's Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Birthdate: \_\_\_\_\_  
Dependent's Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Birthdate: \_\_\_\_\_  
Email address: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_

Do you own Foreign Property or Investments with a cost of more than \$100,000 Canadian? Yes \_\_\_ No \_\_\_

Did you sell your Principal Residence during the year? Sale price \_\_\_\_\_ Years Owned \_\_\_\_\_

#### INCOME SLIPS

T-4'S - from Employer  
T-5's - from Bank or Broker  
T-3's - from Trust, Bank or Broker  
T4E's- EI Benefits  
T4A's- Pension/Annuity Income  
T4A(P) - CPP Canada Pension Benefits  
T4OAS - OAS Benefits  
T4RSP - RSP Withdrawals  
RSP- Home Buyer withdrawal  
Additional T Slips - T600, T5007, etc.  
Foreign Pension Info & Receipts  
T5013 Partnership Slips

#### OTHER INCOME

Investment Income  
- include complete tax package from bank/broker  
- broker contact \_\_\_\_\_  
  
Sale of Real Estate  
- include lawyers statement of adjustment at time of purchase  
- include lawyers statement of adjustment at time of sale  
  
Rental Income - attached link  
Business income - attached link  
  
Alimony Received if Taxable / Agreement

#### DEDUCTIONS and CREDITS

Pension Adjustments (PA) Slips	Disability Amount with Doctor Signed T2200
RRSP Contributions	Interest Paid on Student Loans
Union or Professional Dues	Tuition, Education and Textbooks
Child Care Expenses - include SIN of Provider	Medical Expenses
Moving Expenses	Donations
Support Payments if Deductible /Agreement	
Carrying and Interest Charges Used for Investing	
Employment Expenses - attached link	